Supervisors/Managers
How Do I Guide

Assignments/Approvals

Assignments

How Do I…?	Selections	Tips & Guidelines
Assign case	▪ On the Cases outliner, click the Action icon next to appropriate Case icon. ▪ Click the Assignment icon. ▪ Click the Actions link for an assignment row. ▪ On the Actions page, select Create Assignment and click Continue. ▪ Enter the applicable data/values. ▪ Click the radio button for the new supervisor or worker name for which the assignment is being created.	*eWiSACWIS automatically generates an email to the workers to notify them of the new assignment.*
Reassign case	▪ On the Workers outliner, click the supervisor desk icon to expand the outliner to the worker currently assigned to the case. ▪ Click on the worker icon to bring up the list of cases assigned to the worker. ▪ Click the Actions link for the appropriate case. ▪ Select the Assignment Maintenance radio button and click Continue. ▪ Enter the applicable data/values. ▪ Click the Reassign or Reassign All button. ▪ Enter the applicable data/values. ▪ Select the radio button for the new worker name for the Assignment Details/Worker field. ▪ Click the Assign button.	*eWiSACWIS automatically generates an email to the workers to notify them of the re-assignment.*
Close assignment without reassigning another worker	▪ On the Workers outliner, click the supervisor desk icon to expand the outliner to the worker currently assigned to the case. ▪ Click on the worker icon to bring up the list of cases assigned to the worker. ▪ Click the Actions link for the appropriate case. ▪ Select the Assignment Maintenance radio button and click Continue. ▪ Select the Close radio button. ▪ Click Save and Close	*Assignment cannot be closed if incomplete approvals exist.*
Close assignment to yourself, another supervisor, secondary worker, administrative worker if you have assignment to case	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click the Assignment icon. ▪ Click the appropriate worker name. ▪ On the Worker Assignment page, click the Close radio button and click Save and then Close.	*Assignment cannot be closed if incomplete approvals exist.*
Reassign ticklers via assignment process (current assignment open)	▪ On the Tickler Reassignment page, select the applicable ticklers. Click Save and Close.	*Tickler Reassignment page automatically displays when Current Worker Status Do Not Close radio button is selected.*
Reassign ticklers via assignment process (current assignment closed)	▪ On the Worker Assignment page, click applicable worker. Click OK.	*Worker Assignment page automatically displays when Current Worker Status Close radio button is selected.*

Approvals	Approve case/ provider work	▪ On the Approvals expando, expand the Pending Approvals for 'Your Name' icon and click the applicable pending approval item. ▪ On the applicable page, select Approval from the Options list and click the Go button. ▪ *Note: The Pending Approvals displays with the desk icon and your name.*	*Approval Decision selections:* *Approve-to approve the work and forward for Supervisory Approval, if needed;* *Not Approve-to finalize work that is not receiving approval. The work is "frozen" with a status of Not Approved.* *Reroute-to forward work for approval to another worker using the Create Worker Assignment page.* *Recall/Return-to recall or return work that has been submitted for approval. Work is recalled when any item on the page is changed. The approval process must be re-initiated.* *View-to view the approval history for a piece of work.*
	View approval history	▪ On the Approvals expando, expand the Approvals History icon to view the applicable approval history for work that has received a final approval status ***or*** ▪ On applicable page, select Approval from the Options drop-down and click the Go button to view the history at any point in the approval process.	*This will allow you to view approvals with a final approval status of Approved or Not Approved.* *Initial Status/Initial Action: Item has been created by original worker but not approved* *Pending Status/Approved Action: Item is in Pending status in the approval process but has been approved by original worker* *Pending Status/Received Action: Item is in Pending status in the approval process but has been received by next approver or supervisor* *Approved Status/Approved Action: Item has completed the approval process* *Not Approved Status/Not Approved Action: Item has completed the approval process* *After 4 days the approved work will be removed from the Approvals in Progress outliner.*
	Add/view approval comments	▪ On the Approvals expando, expand the Pending Approvals for 'Your Worker' name icon and click the Actions link on the applicable approval. ▪ On the Actions pop-up page, select Comments. ▪ Click the Continue button. ▪ Add/view comments in the free form text box and click the Save button. Click Close.	*Approval rows with comments will be displayed with a pencil icon.*

Approval Management	Manage Pending Approvals	▪ Click Utilities > Approval Management ▪ The Approval Management page displays. Select the Manage My Pending Approvals radio button. ▪ In the Worker field, select the worker who has forwarded the approval(s) to you, or select 'All' to view all of your pending approvals. ▪ Select the checkbox(es) adjacent to the work item(s) for which you will be entering an approval decision. ▪ Select an Approval Decision to be applied to the selected work items. ▪ Click Save.	*Easy way to approve multiple items simultaneously.* *Approvals with a status of Initial will not appear on the Manage My Pending Approvals activity.* *Review the work prior to making the approval decision by clicking the links in the Work Type column*
	Reroute Worker Approvals	▪ Click Utilities > Approval Management ▪ The Approval Management page displays. Select the Reroute Worker Approvals radio button. ▪ In the Worker field, select the name of the worker for whom you will be rerouting approvals. ▪ Select the checkbox(es) adjacent to the work item(s) you will be rerouting. ▪ Click the Select Worker link. ▪ The Reroute Worker Approval pop-up page appears. ▪ Select the worker who will be receiving the rerouted approvals. ▪ Click Continue. ▪ Click Save.	*Useful when a worker has left the agency and approvals need to be routed to another worker so that the original worker can be inactivated.*

WiSACWIS Help Desk (866) 335-2180

helpdesk@wi.gov

WiSACWIS Knowledge Web

http://dhfs.wisconsin.gov/wisacwis/knowledge_web/index.htm

Case Actions

How Do I…?	Selections	Tips & Guidelines
Change Services Report to a Child Protective Services Report	▪ On the Access Report page, select 'CPS Report' from the Access Report Type dropdown list. ▪ A message displays indicating the Services Report will be changed to a Child Protective Services Report. Click Yes to continue and create the CPS Report. ▪ On the Access Report page, enter the applicable data/values.	*Prior to making the access screening decision, you can change a Services Report to a CPS Report and retain the access participants by changing the value in the Access Report Type dropdown field.*
Change Child Protective Services Report to a Services Report	▪ On the Access Report page, select 'Services Report' from the Access Report Type dropdown list. ▪ A message displays indicating the Child Protective Services Report will be changed to a Services Report. Click Yes to continue and create the Services Report. ▪ On the Access Report page, enter the applicable data/values.	*Prior to making the access screening decision, you can change a CPS Report to a Services Report and retain the access participants by changing the value in the Access Report Type dropdown field.*

Link Services Report to a case or create new case	▪ On the Access Reports expando, click the pending services report.
	▪ On the Decision tab/Supervisor Decision box, click the applicable radio button (Screen in or Screen out).
	▪ Enter the other applicable data/values.
	▪ Click the Create/Link Case link.
	▪ On the Search Case page:
	  ▪ For a match: Click the radio button for the appropriate case and click the Link button.
	  ▪ For no match: Click the Create button and enter the applicable data/values on the Maintain Case page.
		When a new case is created, a message displays asking if you would like to create an assignment to the case. If Yes is selected, the Assignment page displays allowing the case to be assigned to the appropriate worker. Selecting the Close radio button in the Current Worker Status group box will close your assignment to the case. If No is selected for the message asking if you would like to create an assignment to the case, then supervisory assignment is automatically made to the supervisor who created the case. The supervisory assignment to the case can be closed by following the steps in the Assignment section of this How Do I guide.
		
		Service Report type of Re-open Closed Case is selected to re-open a closed.

Link CPS Report to a case or create new case	▪ On the Access Reports expando, click the pending services report. ▪ On the Decision tab/Supervisor Decision box, click the applicable radio button (Screen in or Screen out). ▪ Enter the other applicable data/values. ▪ Click the Create/Link Case link. ▪ On the Search Case page: ▪ For a match: Click the radio button for the appropriate case and click the Link button. ▪ For no match: Click the Create button and enter the applicable data/values on the Maintain Case page.	*When a new case is created, a message displays asking if you would like to create an assignment to the case. If Yes is selected, the Assignment page displays allowing the case to be assigned to the appropriate worker. Selecting the Close radio button in the Current Worker Status group box will close your assignment to the case. If No is selected for the message asking if you would like to create an assignment to the case, then supervisory assignment is automatically made to the supervisor who created the case. The supervisory assignment to the case can be closed by following the steps in the Assignment section of this How Do I guide.* *Service Report type of Re-open Closed Case is selected to re-open a closed.*
De-link a mistakenly linked Services Report or CPS Report from a case	▪ On the Cases outliner, click on the case name link. ▪ On the Maintain Case page, select Delink Intake from the Options list and click Go. ▪ Select the applicable referral/intake, click Save and then click Close.	
Remove person mistakenly added to a case	▪ On the Cases outliner, click on the case name link. ▪ On the Maintain Case page, select the Remove link for the appropriate participant to be removed. ▪ Click save and then click Close.	*Only a supervisor can remove a participant if he/she had been erroneously added to a case and the participant is not associated with any open case work.* *A worker or a supervisor can deactivate a participant if he/she will be a participant in the case but just not an active participant. Please see the Case Maintenance How Do I guide for more information on deactivating a participant.*

Tickler Management

Tickler Management

How Do I…?	Selections	Tips & Guidelines
Tickler Reassignment	▪ Click Utilities > Tickler Management ▪ The Tickler Management page displays. Select the Tickler Reassignment radio button. ▪ In the Worker field, select the worker who has ticklers that need to be reassigned. ▪ In the Case/Provider field, select the case or provider that has ticklers to be reassigned. ▪ The Tickler Reassignment group box will display all ticklers that can be reassigned for the case. ▪ For each tickler to be reassigned, select the appropriate worker in the corresponding Reassign Tickler To field. ▪ Click Save.	*Supervisors can only reassign ticklers for his/her own workers.* *Ticklers can only be reassigned to another worker who has an open active assignment to the case or provider the tickler is for.* *AFCARS ticklers cannot be reassigned.*
Tickler Deletion	▪ Click Utilities > Tickler Management ▪ The Tickler Management page displays. Select the Tickler Deletion radio button. ▪ The Tickler Deletion group box displays. ▪ In the Worker field, select the worker who has ticklers that need to be deleted. ▪ The Tickler Deletion groupbox updates to reflect the ticklers available for deletion. ▪ Click the Delete checkbox for each tickler to be deleted. ▪ Click Save.	*Supervisors can only delete ticklers for his/her own workers.* *Supervisors cannot delete their own ticklers.* *AFCARS ticklers cannot be deleted. Other ticklers will be available for deletion once they have displayed on the Tickler expando for the worker.*
View Case/Provider Ticklers from Worker outliner	▪ On the Workers outliner, click the supervisor desk icon to expand the outliner to view all workers. ▪ Click the Worker icon to expand the appropriate worker who is assigned to the case or provider. ▪ Click on the Actions link for the appropriate case or provider. ▪ Select the View Ticklers radio button and click Continue.	
View Case/Provider Ticklers from Case/Provider outliner	▪ On the Case or Provider outliner, click the Actions link for the appropriate case or provider. ▪ Select the View Ticklers radio button and click Continue.	

Supervisors/Managers How Do I Guide

Worker Information

Worker Information

How Do I…?	Selections	Tips & Guidelines

Establish new worker record	▪ Click Maintain > Worker.
	▪ On the Maintain Worker Information page, click the Search link by the Name field.
	▪ On the Search Person page, enter the applicable data/fields and click the Search button.
	  ▪ For a match: Select the applicable worker and click OK.
	  ▪ For no match: Click the Create button and enter the applicable data/values on the Person Management page. Click Save. Click Close. Click Continue.
	▪ After successfully matching the worker, enter any additional data/values on the Maintain Worker Information page.
		After completing the Person Management page to create the record for the new worker, you will be returned to the Search Person page. Click Continue to return to the Maintain Worker Information page.

Change name of supervisor on worker's record	▪ On the Maintain Worker Information page for the applicable worker, click the Search link by the Supervisor Name field. ▪ On the Worker Search page, enter the applicable data fields/values. ▪ Click the Search button. ▪ Select the radio button for the appropriate supervisor. Click Continue.	*Access the Maintain Worker Information page by clicking Maintain > Worker. Click the Search link on the Maintain Worker Information page to search and retrieve the worker record to update.*
Update worker name	▪ On the Workers outliner, click the supervisor desk icon to expand the outliner to view all workers. ▪ Click on the Actions link for the appropriate worker. ▪ Select the Person Management radio button and click Continue. ▪ Enter/update the applicable data fields/values. ▪ Click Save and click Close.	
View/update training history information	▪ On the Workers outliner, click the supervisor desk icon to expand the outliner to display workers. ▪ Click the worker's name link. ▪ On the Worker Information page/Individual Training History tab, click the Insert button. ▪ In the Worker Training Information box, enter the applicable data fields/values.	*Click Insert to add an additional course listing.*
View/update training plan information	▪ On the Workers outliner, click the supervisor desk icon to expand the outliner to display workers. ▪ Click the worker's name link. ▪ On the Worker Information page/Individual Training Plan tab, enter the applicable training plan year value in the Enter Training Plan Year field. ▪ Enter applicable data fields/values. Click Save and then click Close.	*Click Insert to add a line for new training plan information.* *To add a plan for a new year, type the year in to the Enter Training Plan Year field and proceed to insert new information.*

Supervisors/Managers How Do I Guide

Reports

How Do I…?	Selections	Tips & Guidelines
Review Case Closure Exception Report	No eWiSACWIS selections/entries apply. This report identifies why a case closure has been denied. It is accessible from the eWReports link on the Desktop.	*Counties may contact the Help Desk to be added to the distribution list for this and other reports.* *The reasons a case closure was denied can be viewed on the Case Closure page in the Closure Denial Messages.*

Payments

How Do I…?	Selections	Tips & Guidelines
Initiate payment request	▪ Click Create > Case Work > Payment > Payment Request. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Payment Request page, click the Search link in the Provider Information group box. ▪ On the Provider Search page, enter the applicable data/values and click the Search button. ▪ Select the radio button for the provider. Click Continue. ▪ On the Payment Request page, enter the applicable data/values. ▪ Select Approval from the Options list. Click Go. ▪ Click the Approve radio button. Click Continue. ▪ Click Save and click Close.	*Payment requests can also be initiated via Create > Provider Work or Financial Work.*
Cancel payment	▪ Click Maintain > Financial > Check Pending. ▪ On the Review Pending Checks page, click the Search link for the Provider field. ▪ On the Search page, enter the applicable data/values and click the Search button. Click the appropriate provider icon to expand the outliner and click the radio button for the applicable check (one with pending status). Click Continue. ▪ On the Review Pending Checks page, scroll right to the Payment Status field. ▪ Click Payment Status value. Click Cancel-Do not Pay. ▪ Click Save and then click Close.	*The cancellation must be completed within one day of the original payment request.*
Initiate overpayment adjustment	▪ Click Create > Provider Work > Payment > Overpayment Adjustment and select the provider. ▪ Click the Create button. ▪ On the Provider Overpayments page, enter the applicable To/From dates. ▪ Click the Search button. ▪ Enter the applicable data/values. ▪ Select Approval from the Options list. Click Go. ▪ Click the Approve radio button. Click Continue.	